

Filter and Sort Options

Word's *Mail Merge* feature allows you to customize your merge. For example, you can have the records sorted to print out in a specific order, or you can create a filter so you only merge records that meet specific criteria. These options are selected through the *Filter and Sort* dialog box.

Sorting the Records

By selecting a sort order, you can determine the order in which your records are merged and subsequently printed. For example, you could print letters in numerical order, by zip code, or alphabetically by last name.

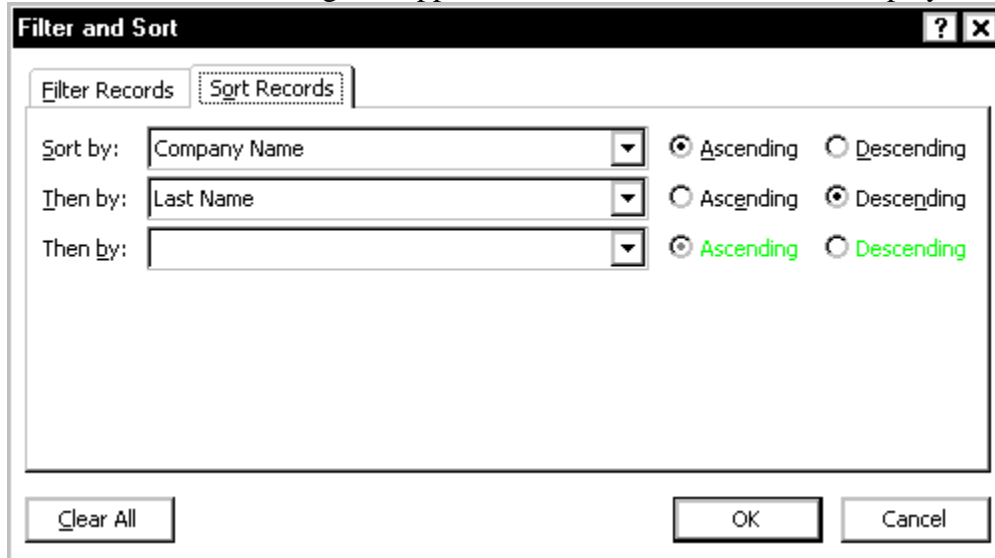
Sorting the Records: QuickSort

1. Open the main document
2. From the *Mailings* command tab, in the *Start Mail Merge* group, click **START MAIL MERGE** » make the appropriate selection
3. In the *Start Mail Merge* group, click **SELECT RECIPIENTS** » make the appropriate selection
4. In the *Start Mail Merge* group, click **EDIT RECIPIENT LIST...**
The *Mail Merge Recipients* dialog box appears.
5. Click the heading you want to sort by
HINT: Clicking the same heading again will reverse the order (i.e., ascending or descending) of the sort.
6. Click **OK**
You are returned to your document.

Sorting the Records: Advanced Sort

1. Open the main document
2. From the *Mailings* tab, in the *Start Mail Merge* group, click **START MAIL MERGE** » make the appropriate selection
3. In the *Start Mail Merge* group, click **SELECT RECIPIENTS** » make the appropriate selection
4. In the *Start Mail Merge* group, click **EDIT RECIPIENT LIST...**
The *Mail Merge Recipients* dialog box appears.

5. In the *Refine recipient list* section, click **SORT**
The *Filter and Sort* dialog box appears, with the *Sort Records* tab displayed.



6. From the *Sort by* pull-down list, select the appropriate option
7. To set the order in which the records will be sorted, select **Ascending** or **Descending**
8. To set up another sort order(s), from the *Then by* pull-down lists, select the appropriate options
9. To close the *Filter and Sort* dialog box, click **OK**
10. Click **OK**
You are returned to your document.

Establishing a Filter

By establishing a filter, you determine specific records to be merged and printed according to the criteria you select. For example, you may want to send letters only to personnel from a specific department.

Establishing a Filter: AutoFilter

1. Open the main document
2. From the *Mailings* tab, in the *Start Mail Merge* group, click **START MAIL MERGE** » make the appropriate selection
3. In the *Start Mail Merge* group, click **SELECT RECIPIENTS** » make the appropriate selection
4. In the *Start Mail Merge* group, click **EDIT RECIPIENT LIST...**
The *Mail Merge Recipients* dialog box appears
5. In the heading that you wish to filter by, click the ▼» select the desired filter
6. Click **OK**
Only the records meeting the selected criteria will be merged.

Establishing a Filter: Advanced

1. Open the main document
2. From the *Mailings* tab, in the *Start Mail Merge* group, click **START MAIL MERGE** » make the appropriate selection
3. In the *Start Mail Merge* group, click **SELECT RECIPIENTS** » make the appropriate selection
4. In the *Start Mail Merge* group, click **EDIT RECIPIENT LIST...**
The *Mail Merge Recipients* dialog box appears
5. In the *Refine recipient list* section, click **FILTER**
The *Filter and Sort* dialog box appears, with the *Filter Records* tab displayed.

	Field:	Comparison:	Compare to:
	Title	Equal to	Dr.
And	State	Equal to	WI
And			

Clear All OK Cancel

6. From the first *Field* pull-down list, select the field on which you want to base your filter
EXAMPLE: To merge only the records of a specific title, from the *Field* pull-down list, select **Title**
7. From the *Comparison* pull-down list, select the type of comparison
EXAMPLE: To continue merging only the records of those who have a certain job title, from the *Comparison* pull-down list, select **Equal to**
8. In the *Compare to* text box, type the value/text to which the information should be compared
EXAMPLE: To finish merging the records of those who are professors, in the *Compare to* text box, type **Dr.**
9. If you want to set up other criteria for filtering, select **And** or **Or** from the pull-down list and repeat steps 7–9 as necessary
10. Click **OK**
Only the records meeting your criteria will be merged.
11. Click **OK**